INFILY

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3-MONTH CERTIFICATE PROGRAM IN ESTATE PLANNING

INSTITUTE FOR FINANCIAL LITERACY

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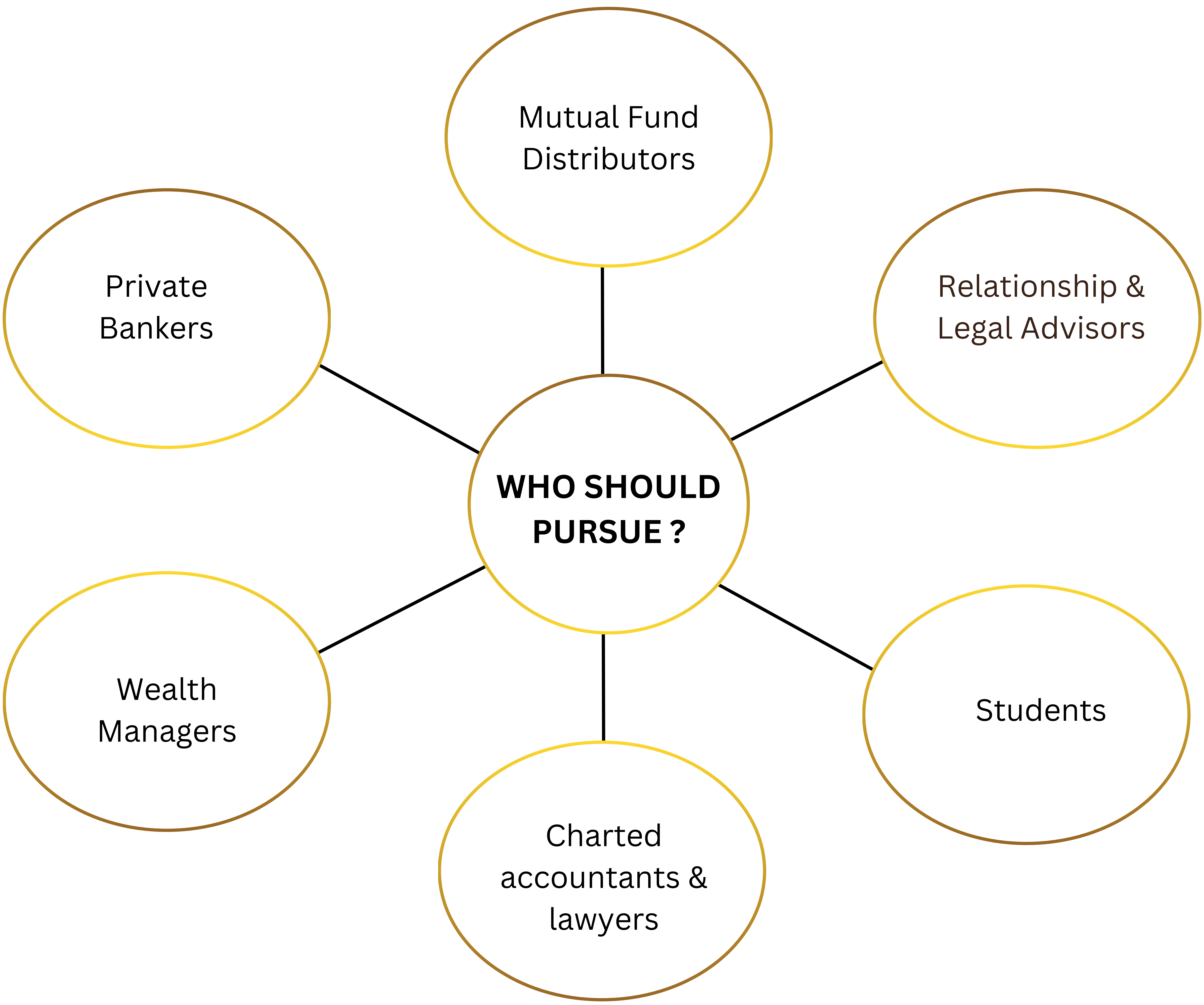
INTRODUCTION

Estate planning ensures that a person's assets are transferred to their family smoothly and according to their wishes. Without proper planning, assets may be distributed as per law, leading to delays, disputes, and financial stress for heirs.

It helps decide who will receive the assets, when they will receive them, and in what manner, while reducing legal complications and family conflicts. Estate planning is not only for the wealthy—anyone with assets needs it to protect their family and secure their financial future.



CURRICULUM – ESTATE PLANNING PROGRAM

ESTATE PLANNING & SUCCESSION LAWS PROGRAM

A comprehensive, practical and case-study driven program designed to build strong expertise in succession laws, estate documentation, trusts, taxation and international estate planning.

MODULE 1: Succession Laws – Core Legal Framework

- Hindu Succession Act
- Muslim Law of Inheritance
- Christian Succession
- Indian Succession Act
- Intestate succession and legal heir determination
- Gender rights and recent judicial interpretations

Case Study Focus:

- Family disputes due to absence of wills
- Different inheritance outcomes under different laws

Outcome: Strong legal foundation across all major succession laws.

MODULE 2: Testamentary Succession & Estate Documentation

- Wills and Codicils – drafting, execution and registration
- Revocation and modification of wills
- Powers of Attorney – General and Special
- Nomination vs legal ownership in banking, insurance and investments

Case Study Focus:

- Invalid wills and contested estates
- Misuse of Power of Attorney

Outcome: Practical mastery of estate documentation and risk prevention.

MODULE 3: Trusts, Gifting & Taxation Strategies

- Private and Family Trusts – formation and governance
- Revocable vs Irrevocable trusts
- Taxation of specific and discretionary trusts
- Gifting rules under Income-tax Act
- Clubbing provisions and tax traps

Case Study Focus:
• HNI trust structuring
• Tax leakage due to incorrect gifting

Outcome: Ability to design tax-efficient estate structures.

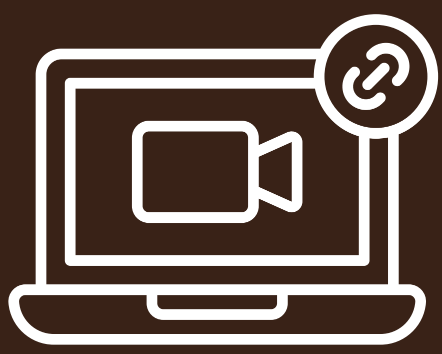
MODULE 4: Advanced, International & Emerging Estate Planning Issues

- Latest legal changes and landmark judgments
- International estate planning and cross-border succession
- NRI and foreign asset inheritance issues
- Digital assets and modern estate risks

Case Study Focus:
• Cross-border inheritance disputes
• Multi-jurisdiction family estates

Outcome: Advanced expertise for complex and global estates.

INFILY PROVIDES :-



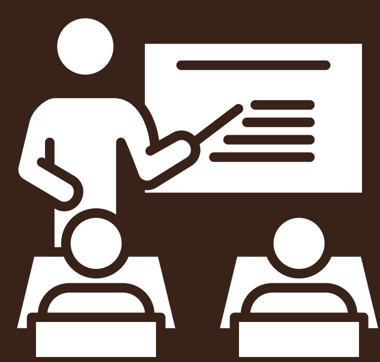
Online Live Classes (Zoom)

Class Recordings after every session

24×7 Online LMS Portal

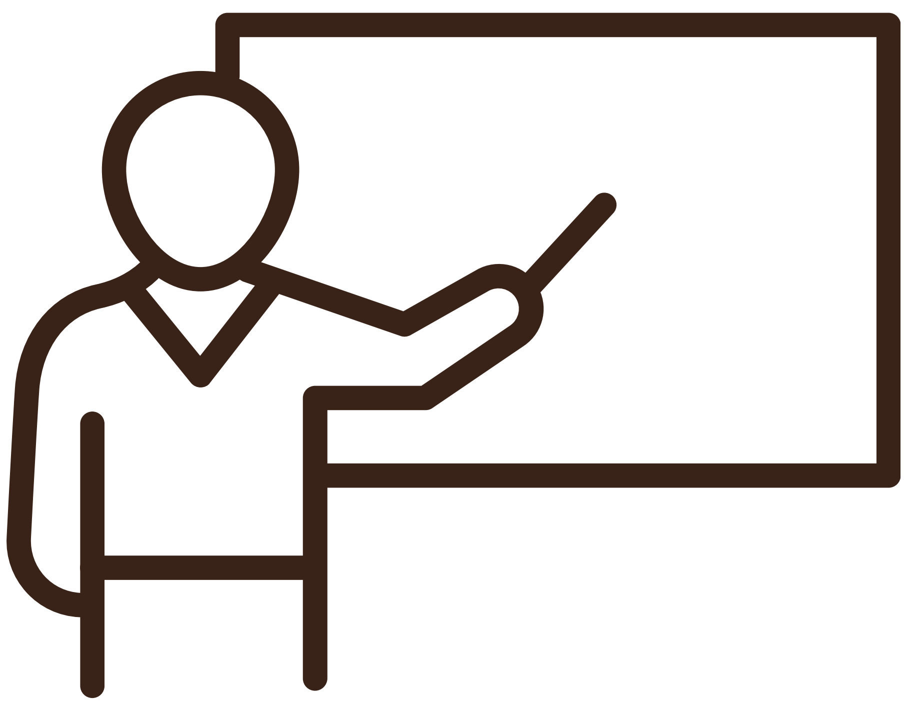
Doubt clearing sessions

Online Mock Tests for practice



Wednesday & Friday | 7:00 AM – 8:30 AM

INSTRUCTOR :-



Mr. Rahul Agarwal
CFP, CTEP

Rahul Agarwal is a seasoned finance professional with 20+ years of industry and training experience. A CFP® and CTEP, he has educated 1 lakh+ investors, trained 250+ CFP professionals, and led 500+ training programs for MFDs nationwide. Formerly Cluster Head – ABSL Mutual Fund, he brings deep expertise in financial planning, mutual funds, and practice management.

TUITION FEES: ₹30,000
(Payable in 2 Installments)

EMI

- 1st Month: ₹15,000
- 2nd Month: ₹15,000

Thank you

Contact us!

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